

UNDERSTANDING THE AREA ASSIGNMENT SHEET

This version of the assignment sheet allows you to assign employees to areas instead of assigning beds or areas to employees. The area assignment sheet displays defined clinic areas for your team. Assignments are created based areas and the jobs needed. Assigning employees to areas allows you to instantly view all the areas to ensure that they are covered.

OVERVIEW OF THE AREA ASSIGNMENT SHEET

HEADER:

- A pink bar displays above the header, with a warning and a link to view the employees that do not have assignments.
- Your name and the unit that is loaded.
- The **Date** and **Day Part** (*which is the shift*). Select **PREV** or **NEXT** if you need to load the previous or next shift.
- **Go to** - use the drop-down to navigate to a specific clinic area.
- Select **Totals** to view the number of staff scheduled for each job on the print (PDF) assignment sheet.
- Select **Print &** a PDF of the Assignment Sheet will display The PDF view displays for employees from the Employee Self Service assignment sheet.
- **Cancel** and **Submit** are located at the top and bottom of the page. Select cancel to cancel your entries and submit to save your entries.
- **BOTTOM OF PAGE** navigation link located above Submit, when selected will take you to the bottom of the page.

TOP SECTION:

- **Staffing Adjustments Section:** Displays the number of staff scheduled for each job in a *ratio, based on the hours scheduled within the day part loaded. The required number is from the Staffing Requirements, this is typically based on the unit's fiscal year staffing budget. Select Required to adjustment the required number of staff as needed. *If you want to see the count of employees scheduled (not by hours), select Totals and Print.
- **Employees On-Call:** Displays the employee's name, job, shift time, and time code for On-Call or Placed On-Call (OCN/POC).
- **Preceptor/Orient Matchup:** Displays the preceptor and their assigned orient, with the preceptor's job, and shift time, when matched through Assignments>Orientation.
- **Employees Scheduled for Extra Shifts:** Displays the employees that claimed shifts through the billboard

MIDDLE SECTION (BODY): Displays in order by clinic area, then assignments within the area, for specific jobs

- **Clinic Areas:** Are created for each team to meet specific needs for staffing.
- **Assignments:** Are created for each area and the jobs needed – hover your mouse over each assignment to view the 14-day history.
- **Making Assignments:** Select the dropdown next to each assignment to display a list of employees scheduled & qualified that can be selected for this assignment
- **Employee Assignment History:** Once you select an employee, hover you mouse over the calendar icon to view the 14-day assignment history for the selected employee.

- **Start and End Times**: The start & end time will populate when you select Set Times & Continue after making an assignment. You will manually type the start & end time if the assignment will be for part of the shift.
- **Jobs**: Each job that is associated with the assignment displays.
- **Comments**: At the end of each assignment row is a comment field directly tied to the assignment for the row. The employee must have an assignment for the comments to display after selecting submit.
- **Set Times and Continue**: This will automatically populate the scheduled start and end times. This button displays in all clinic areas. It is suggested that after you to set the times and continue after completing assignments for each area. You can however select set times and continue at the end or as many times through making assignments as you choose. Note: THIS DOES NOT SAVE YOUR ASSIGNMENTS! You must select Submit to save the assignments.
- **Clinic Area Comment field**: Is located below the assignments for each clinic area. This field is a stand-alone field and is not tied to an assignment. Often used by ORs to list surgeons or cases scheduled to the area/OR
- **General Comments field**: Is located below the last clinic area and can be used for the general shift information.

BOTTOM SECTION:

- **First Off Requests**: Displays a list of the employees who submitted first off requests for this shift, or they were denied their request for time off – listed is employee name, date & time for request, and the date & time the request was created.
- **Employees on Non-Productive Timecodes**: Displays employees on the home team who are scheduled for a time code other than WRK or OCN or POC – listed is employee name, job, timecode, and shift time.

FOOTER:

- **Populate Yesterdays Assignments**: Copies assignments from the previous day
- **View Unassigned Employees**: Link displays a list all the employees who are scheduled but do not have an assignment.
- **Book Off Employee**: Allows you to book off a full shift for an employee without having to leave the Assignment Sheet. Select the dropdown to select employee from the lists. Next, ABS displays as the default time code, select the dropdown & choose a different time code if needed.
- The blank box next to ABS is a comment field that is optional. Comments entered in this box will display in the shift details on the Advanced Schedule View (ASV).
- Select Book Off button and the employee will display in the Non-Productive Timecodes section above.
- **Cancel** and **Submit** Buttons display, same as at top of page.
- **TOP OF PAGE** navigation link, when selected will take you back to the top of the page.